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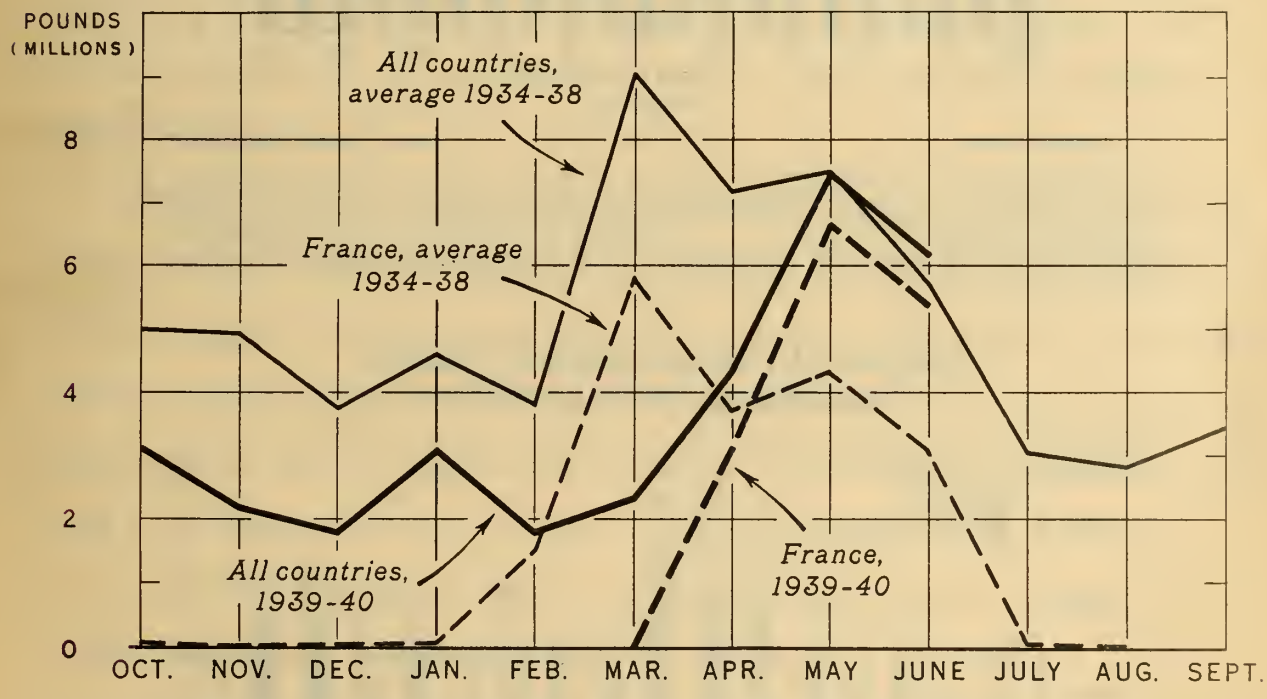
THE Tobacco SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

TS-15 BAE JULY 1940

FIRE-CURED TOBACCO: TOTAL EXPORTS FROM THE UNITED STATES, AVERAGE 1934-38, AND 1939-40

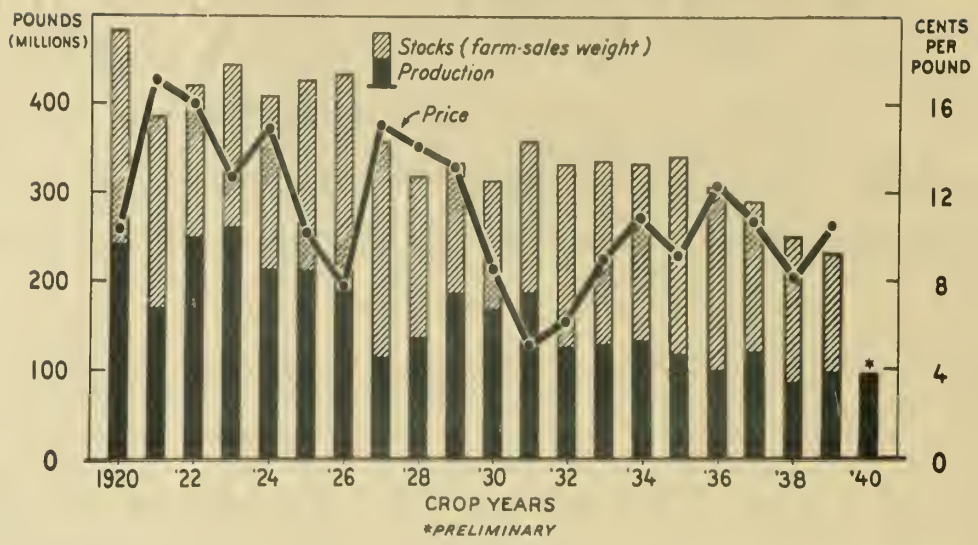


U. S. DEPARTMENT OF AGRICULTURE NEG. 38399 BUREAU OF AGRICULTURAL ECONOMICS

NORMALLY EXPORTS OF FIRE-CURED TOBACCO ARE HEAVIEST FROM MARCH THROUGH JUNE AFTER THE OPENING OF THE FIRE-CURED MARKETS IN DECEMBER OR JANUARY. IN THE 1939-40 SEASON MANY MARKETS OPENED LATER THAN USUAL BECAUSE OF COLD WEATHER. TOTAL EXPORTS OF FIRE-CURED TOBACCO IN 1939-40 HAVE BEEN REDUCED BY MILITARY CONFLICTS IN THE PRINCIPAL IMPORTING COUNTRIES OF EUROPE. FRANCE, THE LARGEST SINGLE IMPORTER OF FIRE-CURED, WAS OFF THE AMERICAN MARKETS UNTIL FEBRUARY, AND AS A CONSEQUENCE EXPORTS TO FRANCE WERE DELAYED UNTIL APRIL. DURING APRIL, MAY, AND JUNE, BY FAR THE LARGER PORTION OF TOTAL EXPORTS WENT TO THAT COUNTRY. THE OUTLOOK FOR EXPORTS TO FRANCE IN THE NEAR FUTURE IS UNCERTAIN.

MORE THAN 3 MILLION POUNDS OF FIRE-CURED TOBACCO, PURCHASED FOR BRITISH ACCOUNT DURING THE 1939-40 SEASON BY THE COMMODITY CREDIT CORPORATION, IS STILL BEING HELD FOR BRITISH OPTION, WHICH EXTENDS TO OCTOBER 1, 1941.

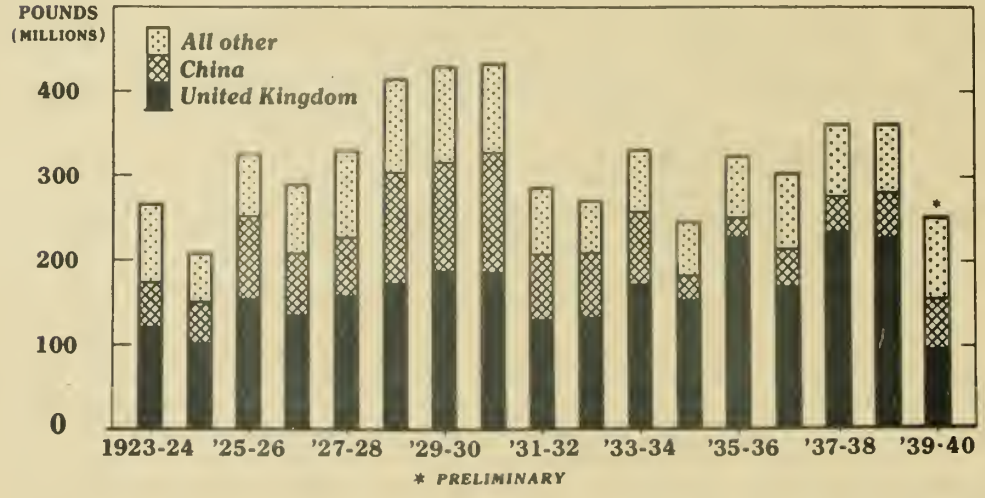
Fire-cured Tobacco: Supply and Price in the United States, 1920-40



U. S. DEPARTMENT OF AGRICULTURE NEG. E6472-B BUREAU OF AGRICULTURAL ECONOMICS

FIGURE 1.- DOMESTIC CONSUMPTION OF FIRE-CURED TOBACCO IS MOSTLY IN THE MANUFACTURE OF SNUFF. EXPORTS HAVE BEEN ON A DECLINING BASIS FOR SEVERAL YEARS. FROM 1935 THROUGH 1938, AS A RESULT OF THE BYPRODUCTS DIVERSION PROGRAMS, DISAPPEARANCE AND PRICES WERE HIGHER THAN WOULD OTHERWISE HAVE BEEN THE CASE. THERE WAS NO BYPRODUCTS DIVERSION PROGRAM IN EFFECT FOR THE 1939 CROP. THE 1939 SUPPLY WAS MORE NEARLY IN LINE WITH DECREASING CONSUMPTION AND EXPORTS THAN THAT OF ANY OTHER RECENT YEAR.

Flue-cured Tobacco: Exports from the United States, 1923-24-'39-40



U.S. DEPARTMENT OF AGRICULTURE NEG. 20627-B BUREAU OF AGRICULTURAL ECONOMICS

FIGURE 2.- EXPORTS OF FLUE-CURED TOBACCO HAVE BEEN MATERIALLY AFFECTED IN RECENT YEARS BY TRADE BARRIERS, AND THE INCREASE IN COMPETITION OF FOREIGN-GROWN FLUE-CURED. BECAUSE OF THE WITHDRAWAL OF BRITISH BUYERS FROM MARKETS AT THE CLOSE OF BUSINESS ON SEPTEMBER 8, 1939 AS A RESULT OF THE BRITISH GOVERNMENT'S WITHHOLDING OF EXCHANGE FOR THE PURCHASE OF AMERICAN TOBACCO, EXPORTS DURING THE YEAR ENDED JUNE 1940 WERE THE LOWEST SINCE THE YEAR ENDED JUNE 1935. THE SPREAD OF THE EUROPEAN WAR HAS AFFECTED ADVERSELY UNITED STATES EXPORTS TO OTHER MARKETS IN EUROPE. EXPORTS TO CHINA IN 1939-40 WERE ABOVE THE AVERAGE OF RECENT YEARS.

THE TOBACCO SITUATION

Summary

The 1940-41 marketing season for flue-cured tobacco will open on August 8 with a supply of more than 2 billion pounds on hand, - about the same as the record supply of the 1939-40 season. Crop conditions on July 1 indicated a 1940 flue-cured crop of 677 million pounds. This is about 480 million pounds less than the record 1939 crop, but this decrease in current production is almost offset by the estimated increase of about 465 million pounds in the current carry-over.

Exports of flue-cured during the 1939-40 season totaled 252 million pounds, compared with 362 million in 1938-39. Exports to the United Kingdom totaled only 97 million pounds as contrasted with normal exports of around 200 million pounds. Exports to China and the Netherlands, however, were above those for the 1938-39 season. No immediate improvement in the export situation as a whole is likely.

On July 20 about 86 percent of the flue-cured growers voting in a referendum favored marketing quotas for the 3 years 1941-43.

The total supply of Burley is about the same as that of last year. The 1940 Burley crop is indicated at about 334 million pounds, - somewhat more than the marketing quota for this kind of tobacco. The July 1 indication for the Maryland crop, on the other hand, is for a crop of 24 million pounds, - 6 million pounds less than the 1939 crop. The fire-cured and dark air-cured crops are about the same as in 1939, and except for the adverse export situation would be in a relatively favorable position.

The total supply of domestic cigar tobacco in 1940-41 is estimated to be about 385 million pounds; the 1939 supply was about 400 million pounds. Smaller crops of filler and wrapper, and reduced stocks of filler and binder account for the decrease. A moderate increase in consumption of cigars seems probable in 1940-41.

Tax-paid withdrawals of cigarettes in June 1940 totaled 17,566,000,000,- a record number for any single month, probably in anticipation of the additional Federal tax of 1/2 cent per pack effective July 1. The withdrawals for the fiscal year ended June 1940 were 177,684,459,000 cigarettes, 10 billion more than for the fiscal year ended June 1939. Cigar withdrawals for the year ended June 1940 were 5,514,592,000 cigars, 61 million more than a year earlier. The prospective increase in consumer incomes over the past year may partly or wholly offset the effect on cigarette consumption of the increased Federal tax. In that event, the increasing number of smokers and apparently continuing shift from other forms of tobacco to cigarettes may result in a further rise in total cigarette consumption.

- July 29, 1940

In this issue: The Downward Trend of Dark Tobacco, by Claudia Thomson

FLUE-CURED, TYPES 11-14

Some voluntary reduction in 1940 acreage evidenced; large yields indicated

The July 1 report of the Crop Reporting Board places the 1940 acreage of flue-cured tobacco for harvest at 753,300 acres. This is slightly below the total of 760,000 acres allotted on the basis of normal yields by the Agricultural Adjustment Administration, and is evidence of some voluntary reduction in acreage by growers cooperating in the adjustment program.

Yields are indicated to be above normal, however, and July 1 conditions pointed to a total production of about 676,645,000 pounds, which is greater than the normal production on the full acreage allotment. The indicated average yield of 898 pounds has been exceeded in only 2 years, - in 1935, when the yield was 928 pounds, and in 1939, when the yield was 900 pounds.

Scheduled market openings

Because of unfavorable weather conditions transplanting was delayed in a large part of the flue-cured area, and the scheduled dates for market openings set by the Tobacco Association of the United States are later than usual. They are as follows: Georgia and Florida (type 14) August 8; South Carolina and North Carolina border markets (type 13) August 20; Eastern North Carolina (type 12) September 3; Middle Belt (type 11b) September 17; and Old Belt (type 11a) September 24.

Supply about as large as in 1939

United States stocks of flue-cured tobacco as of July 1, 1940 are estimated to be 1,410 million pounds. Although the decrease in 1940 production will slightly more than offset the increase in stocks as of July 1, the supply still totals more than 2 billion pounds, or nearly the same as in 1939. The 1940 stocks are larger by at least 150 million pounds than would normally have been the case had not exports been curtailed by the European War. Disappearance in 1939 was lower by about the same amount as the reduction in exports.

Of the 173 million pounds purchased by the Commodity Credit Corporation for the option of British manufacturers, about 11 million pounds have been taken while 161,881,000 pounds remain in stocks in the United States. Exclusive of these stocks still under British option, United States flue-cured stocks total approximately 1,250 million pounds, or about 300 million pounds above the normal stocks of recent years.

Consumption of cigarettes increased in 1939-40

Tax-paid withdrawals of cigarettes showed a substantial increase each month (with the exception of March) during the fiscal year beginning July 1939. Tax-paid withdrawals of cigarettes totaled 168 billion during the fiscal year beginning July 1938 whereas the total for the fiscal year beginning July 1939 was 178 billion, an increase of 5.8 percent over the previous fiscal year. The Defense Tax of the Revenue Act of 1940, effective on cigarettes after June 30, 1940 and before July 1, 1945, raises the Internal Revenue tax from $3.00 per 1,000 to $3.25 per 1,000 on small cigarettes and from $7.20 per 1,000 to $7.80 per 1,000 on large cigarettes. In view of the almost continual increase in per capita consumption of cigarettes over the past several years, the increase in population, and the probability of some further improvement in consumer incomes, the effect of the additional tax on consumption is uncertain. In some cases this tax has been assumed by the manufacturer or distributor and no increase in price has taken place.

United States stocks of foreign-grown cigarette tobacco increased

Imports of cigarette leaf, principally from Greece and Turkey, totaled 50 million pounds in the fiscal year ended June 1940; in the fiscal year ended June 1939, imports totaled 53 million pounds. This was the largest total since 1926, when the figure was 59 million pounds.

Stocks of foreign-grown cigarette leaf in the United States, used principally for blending, at present approximate 120 million pounds. This is the largest total on record, and is equivalent to over 2.5 years' supply. This probably indicates some effort on the part of manufacturers to anticipate any curtailment of imports of cigarette leaf which might result from the increased number of countries included in the European blockade.

Export situation continues uncertain

Europe: Normally, over a period of years, the United Kingdom has taken about one-third of the United States flue-cured tobacco crop, or around 200 million pounds. The action of the British Government in withholding exchange for American tobacco has resulted in exports to the United Kingdom of 97 million pounds during the fiscal year ended June 1940. This is only 8.4 percent of the record 1939 crop of 1,159,320,000 pounds. Practically all of the exports to the United Kingdom consisted of tobacco purchased before the outbreak of the war last September.

Exports of flue-cured leaf to the Netherlands in the fiscal year ended June 1940 totaled almost 19 million pounds, or more than 12 million pounds above the exports in 1938-39 and 14 million pounds above those of 1937-38. Large exports to the Netherlands during September, November, and December 1939, totaling more than 14 million pounds, apparently were in anticipation of a further curtailment of shipping facilities. Exports to other European countries have practically ceased during recent months.

At present the United Kingdom has less than a 2-years' supply of leaf on hand, exclusive of the 162 million pounds of flue-cured remaining under option in the United States. An estimated 20 million pounds of Turkish leaf will be purchased annually by the United Kingdom in accordance with the financial and economic treaty signed between the Turkish, British, and French Governments on January 8, 1940. It was anticipated at that time that the French monopoly would take from 2 to 7 million pounds of this 20 million annually. Should the United Kingdom now take the entire estimated 20 million pounds, it would probably displace approximately an equal amount of United States exports of flue-cured to the United Kingdom.

In 1939, the United Kingdom used in home consumption about 200 million pounds of flue-cured leaf. Empire-grown tobacco now accounts for about 18 to 20 percent or approximately 40 million pounds. On this basis, in order to maintain normal consumption the United Kingdom would require at least 140 million pounds annually of flue-cured leaf from the United States for home consumption - and possibly more if the agreement with Turkey becomes ineffective. To this should be added some 20 million pounds for reexports and the

manufacture of tobacco products for export. Consequently, eventual British needs for American flue-cured tobacco may still be between 140 and 170 million pounds annually. However, any such calculation must necessarily vary with the duration and final political and economic outcome of the present European conflict.

On April 24, 1940 the import duty on tobacco entering the United Kingdom was raised from 13s. 6d. ($2.72) to 17s. 6d. ($3.53) per pound; on July 24 the rate was again increased to 19s. 6d. ($3.93) per pound, (conversions at official prevailing exchange, i. e. shilling = 20.175 cents). This is the third increase since April 23, 1939, when the duty was 11s. 6d. ($2.69) per pound (conversion at average exchange for April 1939).

Orient: Exports of flue-cured leaf to China during the fiscal year ended June 1940 totaled 59 million pounds, 9.4 percent above those of the preceding year and the highest total since the 1933-34 season.

The large shipments for the past year are attributed to the fact that Japanese agencies have taken over much of the supply of Chinese flue-cured tobacco, causing British, American, and Chinese concerns who have supplied most of the domestic cigarettes to import more of their leaf requirements. This situation is believed to be only temporary, and for the coming year it appears that exports of American flue-cured to China will be substantially below those of the past year. Factors indicating lower exports include (1) a 1940 flue-cured crop for China of 140 million pounds as compared with a revised estimate for 1939 of 120 million pounds, (2) the possibility that consumer demand for cigarettes made from imported leaf will not be sufficient to support higher prices which are likely to result from increased taxes and higher cost of materials, (3) difficulties of shipping cigarettes made from imported leaf to interior consuming centers, and (4) uncertainty of exchange and continued unsettled political conditions.

Flue-cured growers vote in favor of 3-year marketing quota

On July 20, 1940 a referendum was submitted to growers of flue-cured tobacco in which they could vote for (1) adoption of marketing quotas for a 3-year period 1941 through 1943; (2) adoption of a quota for 1941 only; or (3) rejection of quotas.

Official returns are incomplete, but the votes counted to July 23 show 191,408 votes cast, of which 164,698 (86.1 percent) approved quotas for the 3 years, 1941-43; 3,409 (1.8 percent) approved quotas for 1 year only; and 23,211 (12.1 percent) were opposed to any quota.

By States the preliminary returns are:

North Carolina, - 135,227 votes cast; 117,580 for quotas for 3 years; 1,973 for quotas for 1 year; 15,674 against any quota.

South Carolina, - 18,264 votes cast 16,204 for quotas for 3 years; 441 for quotas for 1 year; 1,619 against any quota.

Flue-cured tobacco: Production in specified countries, 1934-40

Country	Year beginning July 1						
	1934	1935	1936	1937	1938	1939 2/	1940 2/
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
British Empire sources:							
Australia	3,113	5,557	5,198	5,980	3,922	4,750	---
Canada	22,101	35,199	24,596	55,374	78,174	81,706	3/
Cyprus	894	506	257	33	10	---	---
India 4/	13,500	16,400	19,500	40,000	46,000	5/33,000	---
Mauritius	---	---	562	672	222	431	---
Northern Rhodesia	---	1,210	1,187	1,996	4/ 2,000	---	---
Nyasaland	1,493	2,109	2,293	2,370	3,500	---	---
Southern Rhodesia	19,506	20,709	20,344	25,342	26,168	34,000	---
Union of South Africa	1,800	2,100	3,200	3,800	4,750	---	---
Total reporting countries	62,407	83,790	77,137	135,567	164,746	---	---
Other foreign sources:							
Argentina	---	---	335	583	1,524	---	---
China 4/	140,000	163,000	180,000	210,000	81,500	120,000	140,000
Chosen	7,055	7,063	7,640	9,126	10,997	24,365	26,000
Japan	44,626	51,288	48,893	62,172	64,773	84,374	87,000
Manchuria 4/	3,135	5,000	4,950	7,700	12,500	6/39,000	50,000
Netherlands Indies 4/ 7/	1,000	2,000	4,000	3,300	4,000	---	---
Taiwan	1,076	1,262	1,936	2,885	4,096	8,386	10,000
Total reporting countries	196,892	229,613	247,754	295,766	179,390	---	---
United States	556,780	811,195	682,850	856,302	785,731	1,159,320	676,645
Total all reporting countries	816,079	1,124,598	1,007,741	1,297,635	1,129,867	---	---

1/ The year beginning July includes the harvesting season in both Northern and Southern Hemispheres. In Northern Hemisphere, data for 1934, for example, are for crops harvested in summer and fall of 1934; in Southern Hemisphere they are for crops harvested in spring of 1935. For many countries bordering on the Equator, harvest started late in 1934 and was completed in early months of 1935.

2/ Preliminary. Data for earlier years may be revised on basis of later information

3/ Expected to be somewhere between 65 and 80 percent of the 1939 crop.

4/ Estimated.

5/ The low 1939-40 crop resulted from unfavorable weather, parasites, and diseases, which destroyed much of the area set.

6/ Of this amount, a portion was produced from flue-cured seed but was sun-cured.

7/ Grown in Java.

Compiled from official sources, reports of United States consuls, commercial attaches, agricultural attaches, and commodity specialists in foreign countries.

Flue-cured tobacco: Exports from the United States to principal importing countries, total, July-December, 1938-39, and by months, January-June, 1939-40 1/

Year and month	United Kingdom	Netherlands	Germany	Belgium	Scandinavia 2/	Finland	Irish Free State	Other Europe	China 3/	Australia	Canada	Other countries	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
July-Dec.-													
1938	187,659	3,625	1,347	2,781	3,417	728	7,021	2,726	25,220	10,127	1,382	10,530	256,563
1939	67,276	16,033	807	2,292	8,756	423	2,077	1,200	13,797	11,215	3,332	12,833	140,041
Jan.													
1939	13,989	573	1,440	102	727	---	---	642	1,907	1,343	243	1,320	22,286
1940	9,554	898	---	445	1,128	---	180	243	6,618	6,176	398	2,606	23,246
Feb.													
1939	14,183	276	424	136	1,820	---	342	240	9,717	889	147	1,291	29,465
1940	1,741	547	---	337	755	---	51	92	7,542	6	781	1,688	13,540
Mar.													
1939	7,727	427	526	60	1,491	48	9	140	10,430	2,858	267	2,685	26,668
1940	8,296	1,036	---	545	77	---	73	311	9,082	2,830	958	3,579	26,787
Apr.													
1939	2,358	657	521	52	531	202	---	173	1,218	1,937	209	2,025	9,883
1940	2,759	221	---	75	---	---	58	1,986	2,192	---	423	1,993	9,707
May													
1939	2,015	528	499	131	517	189	5	150	3,835	1,900	360	1,455	11,584
1940	4,820	75	---	---	---	---	125	48	12,921	---	435	2,636	21,110
June													
1939	378	116	214	5	570	60	---	165	1,528	1,752	198	1,065	6,051
1940	2,781	---	---	3	---	250	59	124	6,768	521	25	2,348	12,879
July-June													
1938-39	228,309	6,202	4,971	3,267	9,073	1,227	7,377	4,236	53,855	20,806	2,806	20,371	362,500
1939-40	97,227	18,810	807	3,697	10,716	673	2,623	4,004	58,920	20,748	6,352	27,733	252,310

1/ For exports by months, July-December, 1938 and 1939, see TS-14, p. 9.
2/ Norway, Sweden, and Denmark.
3/ Including Hong Kong and Kwantung.

Compiled from official records of the Bureau of Foreign and Domestic Commerce, Department of Commerce.

Virginia, - 15,848 votes cast; 12,119 for quotas for 3 years; 392 for quotas for 1 year; 3,337 against any quota.

Florida, - 2,904 votes cast; 2,555 for quotas for 3 years; 52 for quotas for 1 year; 297 against any quota.

Georgia, - 19,082 votes cast; 16,157 for quotas for 3 years; 551 for quotas for 1 year; 2,374 against any quota.

Alabama, - 83 votes cast; 83 for quotas for 3 years.

Purchase and loan plans for the 1940 crop were made contingent upon a two-thirds majority vote in favor of marketing quotas for either 1 or 3 years.

Since growers approved marketing quotas for 3 years, 1941-43, the 1941 marketing quota will not be reduced below the 1940 quota whereas the quota would have been 10 percent lower had quotas been favored for 1 year only.

Flue-cured tobacco: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1938-40 1/

Year	Production	Stocks, July 1	Total supply	Disappearance: year beginning July	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Average 1934-38	740.6	844.9	1,585.5	703.9	22.9
1938	785.7	954.5	1,740.2	793.9	22.2
1939 2/	1,159.3	946.3	2,105.6	3/ 695.6	14.9
1940	4/ 676.6	3/ 1,410.0	3/ 2,086.6	---	---

1/ Farm-sales-weight equivalent.
2/ Preliminary.
3/ Estimated.
4/ Indicated July 1.

BURLEY, TYPE 31

Burley acreage in 1940 above allotments

The 1940 Burley acreage for harvest reported by the Crop Reporting Board as of July 1, is 380,800 acres, which is a decrease of 11.9 percent from the 432,200 acres grown in 1939 but is still somewhat above the Burley allotment of the Agricultural Adjustment Administration of 375,000 acres for the 1940 crop. The indicated July 1 acreage yield of 877 pounds - exceeded only by last year's yield of 913 pounds - would give a 1940 production of 333,966,000 pounds, considerably in excess of the normal production on the allotted acreage.

The total supply of Burley in 1940 is expected to be only slightly larger than the 1939 supply of 1,079 million pounds, as the reduction of 61 million pounds in the 1940 crop will about offset the expected increase in stocks as of October 1, 1940.

As in the case of flue-cured, any sales of tobacco by any grower, in excess of the quota allotted to the farm, will be subject to a flat penalty of 10 cents per pound. The season average price for the 1939 crop of Burley was 17.3 cents per pound.

Total demand about same as in 1939; domestic, slightly larger; foreign, probably less

As the result of an anticipated moderate increase in cigarette consumption, domestic consumption of Burley in 1940-41 is expected to be slightly above that in 1939-40. Exports of Burley for the first 9 months of the 1939-40 marketing year totaled 8,928,000 pounds, or 3.8 percent above the same months for the marketing year 1938-39. Increased exports to Portugal account for the bulk of this increase. The bulk of the Burley exports go to Europe, and most of the importing countries are now in the controlled area.

Burley tobacco: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1938-40 1/

Year	Production	Stocks October 1	Total supply	Disappearance year beginning October	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Average, 1934-38	286.9	700.9	987.8	314.2	22.2
1938	339.4	660.7	1,000.1	316.0	19.0
1939 2/	394.8	684.1	1,078.9	3/ 322.9	17.3
1940	4/ 334.0	3/ 756.0	3/ 1,090.0	---	---

1/ Farm-sales-weight equivalent.
2/ Preliminary.
3/ Estimated.
4/ Indicated July 1.

MARYLAND, TYPE 32

Decreased production indicated July 1

The acreage of Maryland tobacco for harvest in 1940 is 37,800 acres, or only 1 percent less than the 1939 acreage. However, the 1940 production indicated July 1 is 24,192,000 pounds, which is a decrease of 18.8 percent below the 1939 production of 29,796,000 pounds. The crop condition as of July 1 was

the lowest in the past several years, and the indicated yield of 640 pounds is the lowest on record with the exception of 1930 and 1933. Transplanting is usually completed by June 15 or 20, but this season the major portion of the crop was planted from 3 to 4 weeks later than usual. With favorable weather during the remainder of the growing season, the present indicated low yield of 640 pounds, however, may be improved before harvest time. Along with the adverse weather conditions, a shortage of plants resulting from plant bed diseases contributed to the indicated low yield this season by necessitating fewer plants per acre.

Supply in 1941 will be smaller than in recent years

Stocks on January 1, 1941 are expected to be about 6 percent smaller than they were on January 1, 1940 and 11.5 percent smaller than the average for 1934-38. The low 1940 production and the smaller carry-over will result in a supply in 1941 of about 58 million pounds, which is 12.1 percent below the 1934-38 average of 66 million pounds.

Exports during the calendar year 1939 totaled 6,332,123 pounds, an increase of more than 40 percent over the exports in 1938. Increased exports in 1939 account in large measure for the increased disappearance in 1939, which is estimated at 32,100,000 pounds, the largest on record. Domestic consumption of Maryland tobacco may increase slightly in 1941 along with the expected moderate increase in consumption of cigarettes. On the other hand, exports may be curtailed still further by the unsettled conditions abroad. Exports for the first 6 months of the calendar year 1940 totaled 1,338,012 pounds, - less than one-half of the total during the same 6 months in 1939.

Crop of 1939 now being sold

The four southern Maryland auction markets at Upper Marlboro, Hughesville, La Plata, and Waldorf opened the 1940 marketing season, for sales of the 1939 crop, on May 7. The markets at La Plata and Waldorf are new markets opening for the first time this season; the markets at Upper Marlboro and Hughesville opened for the first time during the previous season.

Through July 26, 1940, first-hand sales on the auction markets amounted to 9,754,201 pounds, or 33 percent of the 1939 crop. During the entire 1939 auction floor marketing season, which closed September 14, only 25 percent of the 1938 crop was sold. Auction-floor prices have been higher, generally, this season than last season. Offerings last season included considerable quantities of low-grade leaf.

To July 1, a total of more than 11 million pounds of the 1939 crop had been sold at Baltimore and on auction floors at a price averaging about 20 cents.

Maryland tobacco: Exports from the United States to principal importing countries, by months, January-June, 1939 and 1940

Year and month	France	Switzerland	Belgium	Netherlands	Germany	Scandinavia 1/	United Kingdom	Other Europe	Morocco, Algeria, and Tunisia	Other countries	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Jan.											
1939	---	125	81	5	17	22	1	---	---	---	251
1940	16	312	44	14	---	21	9	---	56	22	494
Feb.											
1939	4	203	---	213	---	15	1	---	---	---	436
1940	---	29	---	37	---	32	---	---	29	---	127
Mar.											
1939	30	348	49	294	15	1	---	---	---	---	737
1940	---	---	---	121	---	---	---	---	18	---	139
Apr.											
1939		101	28	55	12	1	---	5	---	---	202
1940	29	153	---	9	---	---	---	---	---	---	191
May											
1939	---	16	9	338	7	3	2	8	---	---	383
1940	---	339	---	2	---	---	---	30	---	9	380
June											
1939	407	30	14	13	1	---	3	---	268	10	746
1940	---	---	---	---	---	---	---	7	---	---	7
Jan.-June											
1939	441	823	181	918	52	42	7	13	268	10	2,755
1940	45	833	44	183	---	53	9	37	103	31	1,338

1/ Norway, Sweden and Denmark.

Compiled from official records of the Bureau of Foreign and Domestic Commerce, Department of Commerce.

Maryland tobacco: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1938-40 1/

Year	Production	Stocks, Jan. 1 of following year	Total supply	Disappearance, following calendar year	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Average 1934-38	27.5	38.4	65.9	27.5	19.7
1938	29.2	37.7	66.9	30.6	18.5
1939 2/	29.8	36.3	66.1	3/ 32.1	19.0
1940	4/ 24.2	3/ 34.0	3/ 58.2	---	---

1/ Farm-sales-weight equivalent.
2/ Preliminary.
3/ Estimated.
4/ Indicated July 1.

FIRE-CURED AND DARK AIR-CURED TOBACCOS, TYPES 21-24 AND 35-37

Acreage increased; indicated crop slightly smaller

The indicated 1940 harvest of fire-cured tobacco will be from 116,200 acres, which is 4 percent greater than the 1939 acreage of 111,700 acres. However, the lower average yield indicated July 1 points to a production of 95,807,000 pounds, which is not greatly different from the production of 95,604,000 pounds in 1939.

Acreage increases occurred in all fire-cured types except Henderson Stemming, type 24, grown in Kentucky, the acreage of which remains the same as in 1939. The greatest decrease in yield occurred in type 21 grown in Virginia, where the yield indicated July 1 is 770 pounds whereas in 1939 it was 910 pounds. This large decrease in yield is attributed to late plantings because of adverse weather conditions; practically no plants had been transplanted by June 1, and the plants were irregular in size. These factors may affect the quality of the crop adversely, but it is probably too early to predict what the quality may be.

Unfavorable weather conditions caused planting in the Kentucky and Tennessee fire-cured areas to be later than usual, but planting was still in good time, and the stand obtained has been reported as satisfactory. The decrease in production of Virginia fire-cured as indicated July 1 just about offsets increases in the production of the Kentucky and Tennessee fire-cured types.

The dark air-cured acreage for harvest in 1940 is 48,900 acres, an increase of 1.9 percent over the 48,000 acres of 1939, and 7,600 acres more than the acreage indicated in March. Acreage increases occurred in both One Sucker (in Kentucky) and Virginia sun-cured. Decreased yields, however, probably will

more than offset any increase in production which might have resulted from the increase in acreage. The total 1940 production of dark air-cured of 42,062,000 pounds, as indicated July 1, is 2.8 percent less than the crop in 1939 totaling 43,287,000 pounds. The decrease in the indicated yield, as of July 1, for Virginia sun-cured is greater than for other dark air-cured types, and, as in the case of Virginia fire-cured, may be attributed to late plantings and adverse weather.

Stocks of fire-cured expected to be lower than normal on October 1, 1940

Stocks of fire-cured tobacco on October 1, 1940 are expected to total about 130 million pounds, - a decrease of 4.6 percent from the stocks as of October 1, 1939, and 33.1 percent from the 1934-38 average. This carry-over is lower than normal because of heavy purchases of the 1939 crop by the French Government. Large purchases also were made by the French Government of stocks of previous crops from tobacco associations and dealers.

Excess stocks of dark tobaccos prior to 1939 were largely eliminated by the Agricultural Adjustment Administration programs, including the byproducts diversion programs which were operative from March 1936 through the 1938 crop year.

About 3,303,000 pounds of fire-cured purchased by the Commodity Credit Corporation and held for British option until October 1, 1941, are included in United States stocks.

France, the largest single importer of American dark types did not enter the American markets for the 1939-40 marketing season until February 1940 and no exports took place before April. Exports to France during April, May, and June totaled more than 15 million pounds. Total exports to France during the previous crop year (1938-39) totaled 18,579,000 pounds. Exports practically ceased to other European countries during April, May and June.

Snuff and plug consumption shows further decline

Tax-paid withdrawals of snuff totaled 37,770,000 pounds during the fiscal year ended June 1940, a decline of 741,000 pounds from the fiscal year ended a year earlier. Production of plug chewing tobacco showed a decline of 2,221,000 pounds during the first 10 months of the present fiscal year from the total of 43,726,000 pounds during the same 10 months in the previous year. On the other hand, 4,721,000 pounds of twist were manufactured during the first 10 months of the present fiscal year, an increase of 238,000 pounds or 5.3 percent over the first 10 months of the fiscal year beginning July 1938.

Fire-cured price of 1939 crop improved; dark air-cured slightly lower

Prices received for all types of the 1939 crop of fire-cured tobacco were generally higher than for the 1938 crop. The average price was 10.5 cents

Fire-cured tobacco: Exports from the United States to principal importing countries, by months, October-December 1938-39, and January-June 1939-40

Year and month	France	Finland	Belgium	United Kingdom	Netherlands	Germany	Switzerland	Scandinavia 1/	Other Europe	Other countries	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Oct.											
1938	70	12	372	59	1,969	245	1,016	1,774	230	358	6,105
1939	---	68	330	---	818	---	794	797	95	255	3,157
Nov.											
1938	---	---	653	68	1,182	458	215	924	162	576	4,238
1939	---	30	283	---	500	---	840	102	194	247	2,196
Dec.											
1938	---	---	360	332	146	227	319	1,217	218	436	3,255
1939	---	---	1	204	13	---	277	998	74	144	1,711
Jan.											
1939	229	---	253	336	164	268	268	676	97	443	2,734
1940	---	---	344	27	424	---	379	1,066	53	764	3,057
Feb.											
1939	4	7	42	502	52	75	144	37	1,261	331	2,455
1940	---	---	660	1	35	---	132	339	271	356	1,794
Mar.											
1939	5,537	---	469	306	320	139	188	116	138	301	7,514
1940	---	---	123	157	1,095	---	72	208	48	618	2,321
Apr.											
1939	3,291	5	339	465	510	93	338	1,201	206	248	6,696
1940	3,105	---	300	61	33	---	133	---	53	651	4,336
May											
1939	5,889	---	292	482	127	115	43	790	394	385	8,517
1940	6,646	---	---	193	---	---	71	---	234	317	7,461
June											
1939	3,558	25	414	122	36	112	7	304	538	852	5,968
1940	5,378	---	---	5	---	---	---	---	110	675	6,168

1/ Norway, Sweden and Denmark.

Compiled from official records of the Bureau of Foreign and Domestic Commerce, Department of Commerce.

compared with 8.2 cents for the 1938 crop. There was a shortage of good tobacco, especially snuff grades, in the 1938 crop. This shortage in the 1938 crop probably was one factor which was partly responsible for the better price for the 1939 crop where these grades were obtainable. The 1939 crop was of a generally better quality. Such a shortage is not expected to prevail in 1940-41.

The average price received for all dark air-cured types in 1939 was 7.3 cents, slightly lower than the 1938 average price. The general quality of the One Sucker crop was better in 1939 than in 1938, but a large portion of the Green River crop consisted of so-called "gray faced" leaf which is considered undesirable for some uses.

Dark tobaccos: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1938-40 1/

TOTAL ALL DARK TOBACCOS

Year	Production	Stocks October 1	Total supply	Disappearance, year beginning October	Average price per pound
Fire-cured, types 21-24, and dark air-cured, types 35-37	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Cents
Average 1934-38	145.2	257.0	402.2	161.4	10.0
1938	113.8	228.7	342.5	150.2	8.1
1939 2/	138.9	192.3	331.2	3/ 140.1	9.5
1940	4/ 137.9	3/ 191.1	3/ 329.0	---	---

FIRE-CURED

Total, Types 21-24					
Average 1934-38	110.0	194.2	304.2	122.7	10.2
1938	81.0	168.3	249.3	113.1	8.2
1939 2/	95.6	136.2	231.8	3/ 101.8	10.5
1940	4/ 95.8	5/3/ 130.0	3/ 225.8	---	---

Continued -

Dark tobaccos: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1938-40 1/ -Contd.

DARK AIR-CURED

Year	Production	Stocks October 1	Total supply	Disappearance, year beginning October	Average price per pound
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Cents
Total, Types 35-37					
Average 1934-38	35.2	62.8	98.0	38.7	9.4
1938	32.8	60.4	93.2	37.1	8.0
1939 2/	43.3	56.1	99.4	3/ 38.3	7.3
1940	4/ 42.1	3/ 61.1	3/ 103.2	---	---
One Sucker, Type 35					
Average 1934-38	16.6	30.8	47.4	17.8	8.9
1938	15.8	33.6	49.4	20.5	5.9
1939 2/	22.0	28.9	50.9	3/ 21.9	6.5
1940	4/ 21.3	3/ 29.0	3/ 50.3	---	---
Green River, Type 36					
Average 1934-38	15.9	29.3	45.2	18.3	9.7
1938	14.8	23.6	38.4	14.2	9.6
1939 2/	18.0	24.2	42.2	3/ 13.2	7.4
1940	4/ 17.7	3/ 29.0	3/ 46.7	---	---
Va. sun-cured, Type 37					
Average 1934-38	2.7	2.7	5.4	2.6	11.5
1938	2.2	3.2	5.4	2.4	12.7
1939 2/	3.3	3.0	6.3	3/ 3.2	12.2
1940	4/ 3.1	3/ 3.1	3/ 6.2	---	---

1/ Farm-sales weight equivalent. 2/ Preliminary. 3/ Estimated. 4/ Indicated July 1. 5/ Exclusive of approximately 13 million pounds owned and held in the United States by representatives of foreign countries.

CIGAR TOBACCOS, TYPES 41-62

Total production of all cigar leaf in 1940 as indicated July 1 is 119,013,000 pounds, a decrease of 5.4 percent from the 1939 production of 125,849,000 pounds. The largest decreases were in Pennsylvania seedleaf, type 41, and Connecticut Valley shade-grown, type 61; the decrease in the former was from 35,508,000 pounds to 27,700,000 pounds or 22 percent, and in the latter from 8,624,000 pounds to 6,630,000 pounds or 23.3 percent.

The quality of the 1939 Connecticut Valley broadleaf and Connecticut Valley Havana seed, binder types 51 and 52, was the best in the past several years, and the average price to growers for the crop of type 51 was 22 cents compared with 15 cents in 1938; and for type 52, the price received was 24 cents per pound compared with 15 cents for the 1938 crop. Price increases, though smaller, also occurred for the 1939 crop of Wisconsin binder, and for the same reason.

The 1940 supply of filler types as a whole is a little more than 5 percent below the supply of the 2 previous years and about 8.5 percent below the 5-year average, 1934-38. Stocks as of October 1 (July 1 for type 45) are expected to be a little lower than stocks in recent years. The 1940 supply of binder is probably about 4 million pounds larger than reported in the following table, as stocks of southern Wisconsin, type 54, still held on farms, is said to be about 25 percent of the 1939 crop. If flood and hurricane losses are deducted from the 1938 production, the 1938 supply of binder types would be 185.6 million pounds and the disappearance 69.0 million pounds. If the estimated farm stocks are added to the 1940 carry-over, the estimated 1939 disappearance will be 63.7 million pounds, a figure well in line with the disappearance in 1938 and with the 1934-38 average disappearance. Stocks of wrapper as of October 1 (July 1 for type 62) are expected to be somewhat larger than in 1939, but the production of wrapper indicated on July 1 partly offsets this expected increase, and the 1940 supply of wrapper is expected to be about the same as in 1939. For domestic cigar leaf as a whole the 1940 supply is expected to approximate 385 million pounds, which is about 15 million pounds less than the 1939 supply.

The 1939 price received for Connecticut Valley shade-grown, type 61, was 80 cents, or 20 cents higher than the price received for the 1938 crop. On the other hand, the price received for the Georgia-Florida shade-grown crop averaged 67 cents, while the 1938 price averaged 71.5 cents. Despite the season's late start the 1940 Georgia-Florida shade crop is said by several growers to be in the best condition of any crop in recent years.

American buying of the 1939 crop of Sumatra wrapper was heavy. The 1938 Sumatra crop did not contain sufficient wrapper material for the American market but the 1939 crop was superior in many respects. Also, American interests probably wanted to protect themselves against any possible shortage of Sumatra wrapper due to conditions which might result from the war. Purchases from the 1939 crop amounted to 16,048 bales (about 2,921,000 pounds), but 500 bales (about 91,000 pounds) not useful as American wrappers were resold. American purchases of the 1938 crop amounted to 9,600 bales (about 1,747,000 pounds) at prices considerably lower than prices paid for the 1939 crop.

The first auctions held in Sumatra were considered successful, and if the war should continue sales will be held again at Medan. The freight rate on tobacco from Belawan-Deli to New York and other Atlantic Coast ports of the United States has been fixed by the Deli-New York conference at $53 per 800 kilograms (about 1,764 pounds).

Domestic consumption of cigars is expected to show some further increase during the year beginning July 1940. The fiscal year ended June 1940 showed tax-paid withdrawals of large cigars to be 5,515,000,000, or 1.1 percent over the same year ended June 1939. The prospects for some increase in consumer incomes is expected to result in a continued moderate increase in cigar consumption during 1940-41. Production of scrap chewing, however, declined 3.1 percent in the first 10 months of the present fiscal year from 36,387,000 pounds for the same 10 months of the fiscal year beginning July 1938.

Cigar tobaccos: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1938-40 1/

Class and year	Production	Stocks Oct. 1 2/	Total supply	Disappearance year beginning Oct.	Average price per lb.
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
Filler, Types 41-45					
Average 1934-38	44.6	163.2	207.8	48.9	10.4
1938	45.6	154.9	200.5	53.0	12.3
1939 3/	53.4	147.5	200.9	4/ 56.9	12.2
1940	5/ 46.1	4/ 144.0	4/ 190.1	---	---
Binder, Types 51-55					
Average 1934-38	41.4	165.1	206.5	60.0	12.5
1938 6/	53.0	136.0	191.0	74.4	9.6
1939 3/	61.1	116.6	177.7	4/ 72.7	16.8
1940	5/ 62.7	4/ 105.0	4/ 167.7	---	---
Wrapper, Types 61-62					
Average 1934-38	8.4	10.7	19.1	8.9	78.3
1938 6/	9.0	9.2	18.2	7.4	64.9
1939 3/	11.4	10.8	22.2	4/ 9.6	76.8
1940	5/ 10.3	4/ 12.6	4/ 22.9	---	---

1/ Farm-sales weight equivalent.
2/ Stocks held on farms not included; stocks for types 45 and 62 are as of July 1.
3/ Preliminary.
4/ Estimated.
5/ Indicated July 1.
6/ Production includes loss after harvest as a result of hurricane and flood, estimated as follows: Broadleaf (type 51) 3,820,000 pounds; Havana Seed (type 52) 1,547,000 pounds; and Shade (type 61) 588,000 pounds. These losses are also included in the 1934-38 average.

Production, stocks, supply, disappearance, and price of filler tobacco, type 46, grown in Puerto Rico, 1935-39 1/

Year beginning July	Production	Stocks January 1, farm-sales weight 2/	Total supply	Disappearance	Price
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
1935	26.0	50.2	76.2	25.0	12.0
1936	35.0	51.2	86.2	29.7	14.0
1937	44.1	56.5	100.6	36.4	11.0
1938	11.7	64.2	75.9	28.5	19.0
1939		47.4			

Compiled: Production and price from annual reports of the Governor of Puerto Rico; stocks from reports of the Agricultural Marketing Service.
1/ Production data are for the harvesting year beginning July and stocks are as of January 1 in the harvesting year.
2/ Including stocks held by dealers and manufacturers in the United States and on the Island of Puerto Rico. Stocks on the Island were not reported prior to January 1, 1936.

THE DOWNWARD TREND OF DARK TOBACCO

In the 5 years immediately preceding the first World War dark types of tobacco were fairly important in domestic use and predominant in exports. In 1909 the acreage in fire-cured and dark air-cured was 434,484 acres, with a production of 334,023,000 pounds. The 5-year average (1909-13) of fire-cured and dark air-cured was 425,111 acres, or 33 percent of the average of total United States tobacco for the same years. Production in this period averaged 324,489,000 pounds, or 31 percent of total United States average production for these years.

Production data by types are not available for the years prior to 1909, but data by growing areas indicate that dark types were an even more predominant part of United States production for the years before 1909.

The 5-year (1934-38) average acreage preceding the present European War was 176,980 acres, or 12 percent of total United States average acreage for the same 5 years; and production averaged 145,211,000 pounds, or 11 percent of United States production.

Statistics on exports by types are not available for years prior to 1923. However, estimates considered reliable place exports of fire-cured at about 200 million pounds and of dark air-cured at about 30 million pounds annually for the period just prior to the first World War. For the period 1934-38, fire-cured exports averaged 60,892,000 pounds and dark air-cured 3,917,000 pounds. (Fig. 3)

Thus, acreage and production of all fire-cured types have shown a very definite downward trend since 1909. In the case of fire-cured, type 21, grown in Virginia, production at present is approximately one-third of what it was in the earlier years; of the fire-cured types grown in Kentucky and Tennessee, type 22 is about 70 percent of what it was in the earlier years, and type 23 about 40 percent; of type 24, grown only in Kentucky, about 10 percent. (Official type data by States are available only since 1919.) In the early 1920's Kentucky was the larger producer of type 22, whereas in the late 1930's Tennessee was the larger producer of this type. In the case of type 23, Kentucky has been and still is by far the larger producer.

The total production of One Sucker, type 35, grown in Indiana, Kentucky, and Tennessee decreased from an average of 41 million pounds annually just prior to the first World War to an average of about 17 million pounds during the 5 years 1934-38. Of the total production, that in Indiana decreased from 11 percent of the total to 2 percent from 1919 to 1939; Kentucky's production increased from 62 percent to 83 percent of the total in the same years; and Tennessee's production decreased from 26 percent to 15 percent of the total. Green River grown in Kentucky decreased from an approximate average of 50 million pounds (1909-13) to an average of about 15 million pounds (1934-38), and during the same periods Virginia sun-cured, type 37, decreased from approximately 10 million pounds to less than 3 million pounds. It is apparent, therefore, that tobacco production is not static, but changes in response to various economic factors, especially consumer preferences.

Dark tobaccos, types 21-24 and 35-37: Acreage, yield per acre, production, price per pound, and crop value, United States, 1909-40

Year	Acreage	Yield per acre	Production	Price per pound	Crop value
	Acres	Pounds	1,000 pounds	Cents	1,000 dollars
1909	434,484	769	334,023	7.3	24,399
1910	481,677	784	377,650	7.8	29,613
1911	367,186	820	301,130	8.1	24,326
1912	472,499	693	327,290	7.0	22,796
1913	369,707	764	282,352	7.8	21,899
1914	353,059	806	284,654	6.6	18,842
1915	414,348	778	322,440	6.4	20,699
1916	467,973	803	375,837	10.6	39,765
1917	472,410	817	386,060	15.5	59,973
1918	433,751	819	355,100	18.6	66,014
1919	570,000	740	422,075	17.2	72,475
1920	447,600	784	350,896	9.7	33,923
1921	300,200	791	237,346	16.3	38,633
1922	451,000	845	367,653	15.5	57,095
1923	468,700	814	381,690	12.1	46,035
1924	393,800	777	306,076	13.9	42,551
1925	386,300	784	303,011	9.5	28,891
1926	324,100	824	267,180	7.6	20,437
1927	202,900	740	150,137	13.9	20,897
1928	244,700	737	180,400	13.6	24,496
1929	296,600	834	247,231	12.6	31,273
1930	316,700	733	232,181	8.4	19,392
1931	312,200	810	253,010	4.7	11,797
1932	206,800	777	160,671	5.7	9,230
1933	209,000	763	159,439	8.7	13,930
1934	197,600	877	1/ 173,218	10.0	16,529
1935	179,300	828	148,429	8.9	13,277
1936	160,800	773	124,242	12.9	16,045
1937	196,300	847	166,351	10.0	16,560
1938	150,900	754	113,835	8.1	9,273
1939	159,700	870	138,891	9.5	13,176
1940 2/	165,100	835	137,869	---	---

1/ Includes 3,500,000 pounds not marketed under agreements with Agricultural Adjustment Administration contracts.
2/ Indicated July 1.

TOBACCO: PRODUCTION AND EXPORTS OF DARK TYPES, UNITED STATES, 1909-39

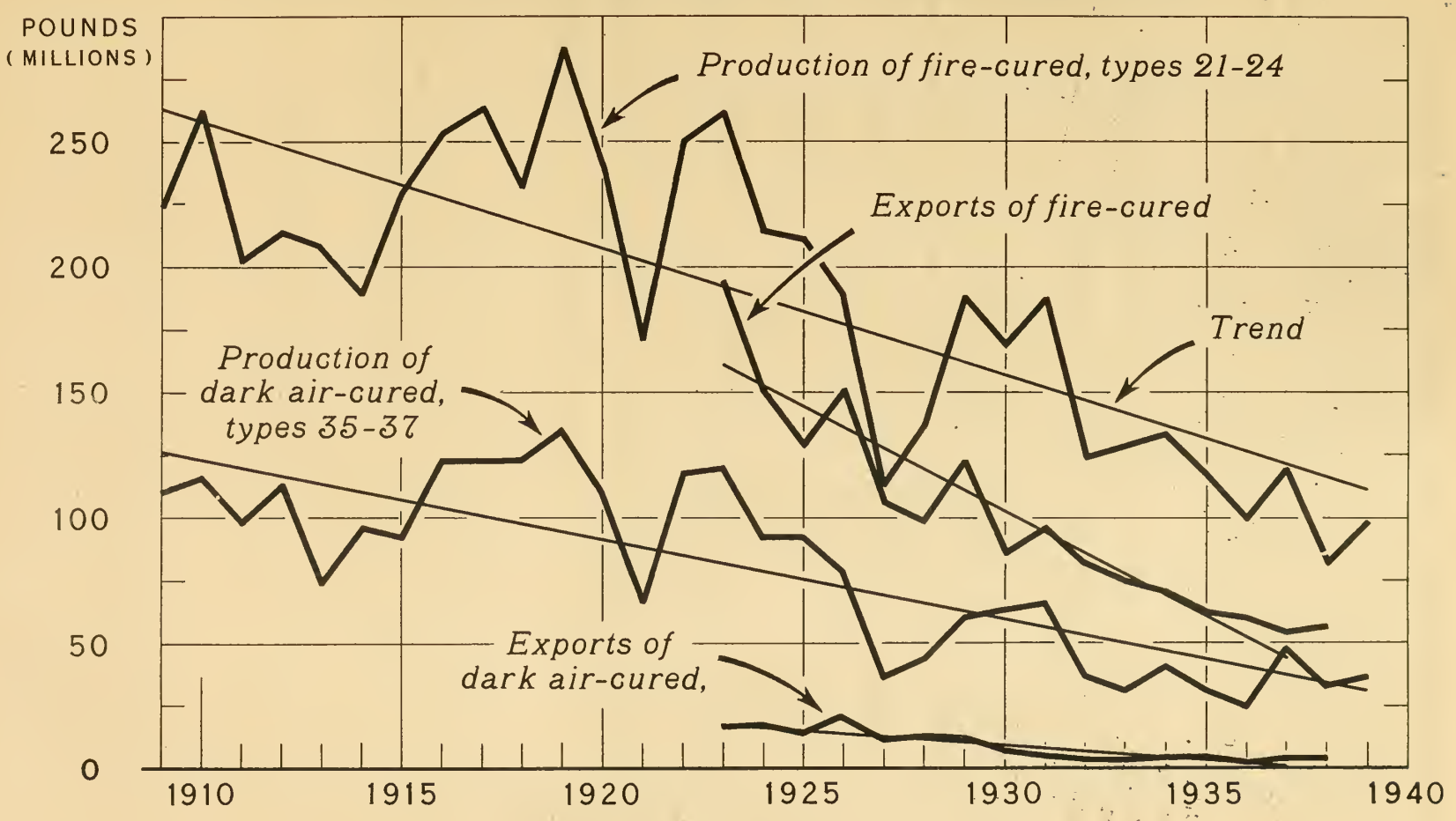


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FIGURE 3

The dark-tobacco areas of Kentucky are concentrated largely in about 28 counties, or portions of counties, in the western part of the State. In Tennessee the dark areas are concentrated in about 12 counties with smaller acreages in about 12 other counties located in the northwest portion of the State adjoining the dark areas of Kentucky. In Indiana, dark tobaccos are grown in 2 of the southern counties, also adjoining the Kentucky area, with scattered patches in about 3 other counties. The Virginia dark types, principally fire-cured, are grown in some 30 counties in the central part of the State.

Dark-tobacco growing areas of the United States, 1930

Area 1/	Farms 1930		Total value of all crops (1930)	Total value of dark tobacco	Value dark tobacco as percentage of all crops
	Total in area	Growing tobacco			
	Number	Number	1,000 dollars	1,000 dollars	Percent
Kentucky	48,260	39,401	24,603	9,684	39.4
Tennessee	27,797	19,392	17,291	7,334	42.4
Indiana	6,824	1,941	2,437	173	7.1
Virginia	21,666	8,921	10,527	2,201	20.9
Total	104,547	69,655	54,858	19,392	35.3

Compiled from Census of the United States, except value of dark tobacco which is from Statistical Bulletin No. 58.

1/ Including only counties in each State where dark tobacco growing is concentrated.

The total value of all crops grown in the entirety of these 4 States in 1930 was $325,717,000, of which dark tobaccos represented 6 percent. The 1935 Agricultural Census shows the number of farms in these same areas as 158,022, an increase of 51 percent. The number growing tobacco, however, was reported as 65,819, a decrease of 5.5 percent.

Farms growing only dark tobacco in each State in 1935 and 1939 are shown in the following table:

Dark-tobacco areas with number of farms and value of crop, 1935 and 1939

State 1/	Farms growing dark tobacco		Growers 2/	Value of dark tobacco crop		Average returns Per farm		Per grower
	1935	1939	1939	1935	1939	1935	1939	1939
	Number	Number	Number	1,000 dollars	1,000 dollars	Dollars	Dollars	Dollars
Kentucky	29,029	28,790	38,100	5,704	5,492	196	191	144
Tennessee	12,227	13,924	19,920	5,146	4,913	421	353	247
Indiana	272	463	700	35	23	129	50	33
Virginia	10,554	11,447	15,680	2,392	2,748	227	240	175
Total	52,082	54,624	74,400	13,277	13,176	255	241	177

Compiled: Number of farms and approximate number of growers from records of the Agricultural Adjustment Administration (census definition of a farm differs from that of the Agricultural Adjustment Administration); crop values from reports of the Crop Reporting Board.

1/ Besides the States listed the records of the Agricultural Adjustment Administration show 5 farms in Illinois and 11 farms in Missouri growing dark tobacco in 1939.

2/ Approximate number representing owners, tenants, and share croppers.

There are at least two specific reasons for the downward trend of exports of dark tobaccos, which prior to 1909 were the predominant export types: (1) the expanded production of dark types abroad, particularly in certain countries which were formerly important importers of American dark types, and (2) the decreased consumption of tobacco products manufactured from dark types as a result of a shift to cigarettes and light smoking mixtures in countries formerly importing dark types.

Kentucky and Tennessee fire-cured, types 22-24, are the most important dark export types. Exports of these types have decreased year by year from 167 million pounds in the export year beginning October 1923 to 46 million pounds in the year beginning October 1938. France, Spain, Belgium, Italy, the Netherlands, and Germany have been the most important importers. Of these countries, France has been the largest single importer of fire-cured tobacco. The present disrupted conditions in France have affected adversely exports to that country, with no immediate improvement in prospect. France was off the dark markets from the beginning of the season in October 1939 until February 1940. (Note chart on cover page.)

During the past 15 years Italy's production of tobacco, largely dark types and particularly fire-cured, has increased to such an extent that it is now practically double what it was immediately following the first World War. Italy not only has increased production but also has made notable improvement in the quality of fire-cured tobacco. France and Germany growing dark air-cured, have each increased production by an approximate one-third in the same years; Spain in the 10 years preceding 1935 increased production of dark air-cured from about 2 to 16 million pounds. (Production in Spain was curtailed during the recent civil war but the Government has been active

recently in encouraging expansion.) No commercial tobacco crop is grown in the Netherlands and imports of dark tobaccos into the Netherlands from the United States and from other countries have decreased in recent years, probably because of decreased consumption of dark-tobacco products.

In the United States there has been a significant increase in total consumption of tobacco products, but consumption per capita has remained somewhat stable during the past 15 or 20 years, except in periods of depression. Year-to-year variations which have occurred in per capita consumption of tobacco products have been rather closely correlated with changes in business conditions. (Fig. 4.) Changes in consumption per capita have represented shifts among products rather than any significant increase in the total quantity per person. During periods of low income the shift has been toward less expensive products, as for instance, to cheaper brands of the same commodity or from cigars and cigarettes to pipe tobacco. These shifts do not appear to benefit the dark types. There has been a pronounced upward trend in cigarette consumption, but this upward trend has been offset to a very large extent by a decided decrease in consumption of chewing tobacco. In other words, the significant shift has been toward cigarettes and light smoking mixtures and away from products made from dark tobaccos, not only in the United States but in many parts of the world. (Fig. 5.)

Snuff is the principal domestic fire-cured tobacco product. About 37 million pounds of snuff are consumed annually in the United States. Italian-type cigars also are made principally from fire-cured tobacco. Consumption of Italian-type cigars has declined in recent years. In the earlier years of the twentieth century production of Italian-type cigars was quite an important part of the dark-tobacco manufacturing industry. The earlier Italian population preferred this type of cigar but the younger generation of Italians probably have shifted to cigarettes, the modern smoke, thereby causing the decline in consumption of the Italian-type cigar.

It is difficult to be specific about the uses of a particular type of tobacco. The fact that extremely small quantities of fire-cured tobacco are used in some cigarettes will illustrate this point. Dark air-cured, and a very limited quantity of fire-cured, are also used in plug tobacco. In twist some fire-cured is used but by far the greater part is dark-air-cured. Small quantities of both dark air-cured and fire-cured are used in smoking tobacco. 1/

1/ For some detail concerning type uses in tobacco products see Tobacco Types Make the Flavor, by J. V. Morrow, in MARKETING ACTIVITIES, Vol. 2, No. 4, April 1940, pp. 9-15.

United States exports of dark tobaccos to principal importing countries, by types, average 1923-32, annual 1933-38

Country to which exported	10-year average 1923-32	1933	1934	1935	1936	1937 1/	1938 1/
	Crop year beginning October						
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
	Virginia fire-cured, type 21						
United Kingdom	2,686	1,143	1,620	1,382	1,603	1,657	1,238
Australia	1,699	359	42	60	649	217	213
Germany	2,921	1,479	1,293	1,213	993	962	1,002
Netherlands	1,910	1,314	445	297	315	227	1,013
China	692	10	10	125	6	0	0
Norway	1,804	1,812	1,539	1,870	2,090	1,667	2,953
Canada	354	43	114	176	101	37	27
Sweden	674	1,805	1,169	1,537	1,161	546	739
Denmark	290	505	250	150	75	290	128
Belgium	1,059	1,030	906	421	425	129	212
Portugal	469	382	600	258	267	462	218
France	643	0	56	20	34	46	846
Other countries	3,970	2,078	2,237	2,387	1,773	1,511	1,506
Total	19,171	11,960	10,281	9,896	9,492	7,751	10,095
	Kentucky and Tennessee fire-cured, types 22, 23, and 24						
France	23,870	20,267	17,515	18,915	18,986	18,452	17,733
Spain	11,217	5,416	12,222	7,844	0	0	981
Belgium	9,640	10,699	5,502	4,606	6,587	3,414	4,224
Italy	4,438	922	574	101	780	695	229
Netherlands	9,434	3,122	2,114	2,296	6,227	6,721	5,873
Germany	9,923	6,314	7,015	3,570	2,272	2,307	1,668
United Kingdom	9,624	2,174	3,470	2,842	3,278	2,516	1,626
Argentina	2,161	535	141	85	124	91	293
Switzerland	1,565	3,539	1,548	1,520	2,176	1,994	3,327
Other countries	20,563	10,048	10,164	11,087	9,963	10,809	10,466
Total	102,435	63,036	60,265	52,856	50,393	46,999	46,420
	One sucker, type 35 2/						
Poland & Danzig	244	0	0	0	0	0	0
Belgium	754	593	556	511	305	90	1,580
British West Africa 3/	1,130	135	44	65	37	1	27
French Africa 4/	284	69	131	105	25	31	34
France	3	0	0	0	0	0	0
United Kingdom	28	0	0	8	0	15	1
Other countries	265	238	390	147	91	80	157
Total	2,708	1,035	1,121	836	458	217	1,799

Continued -

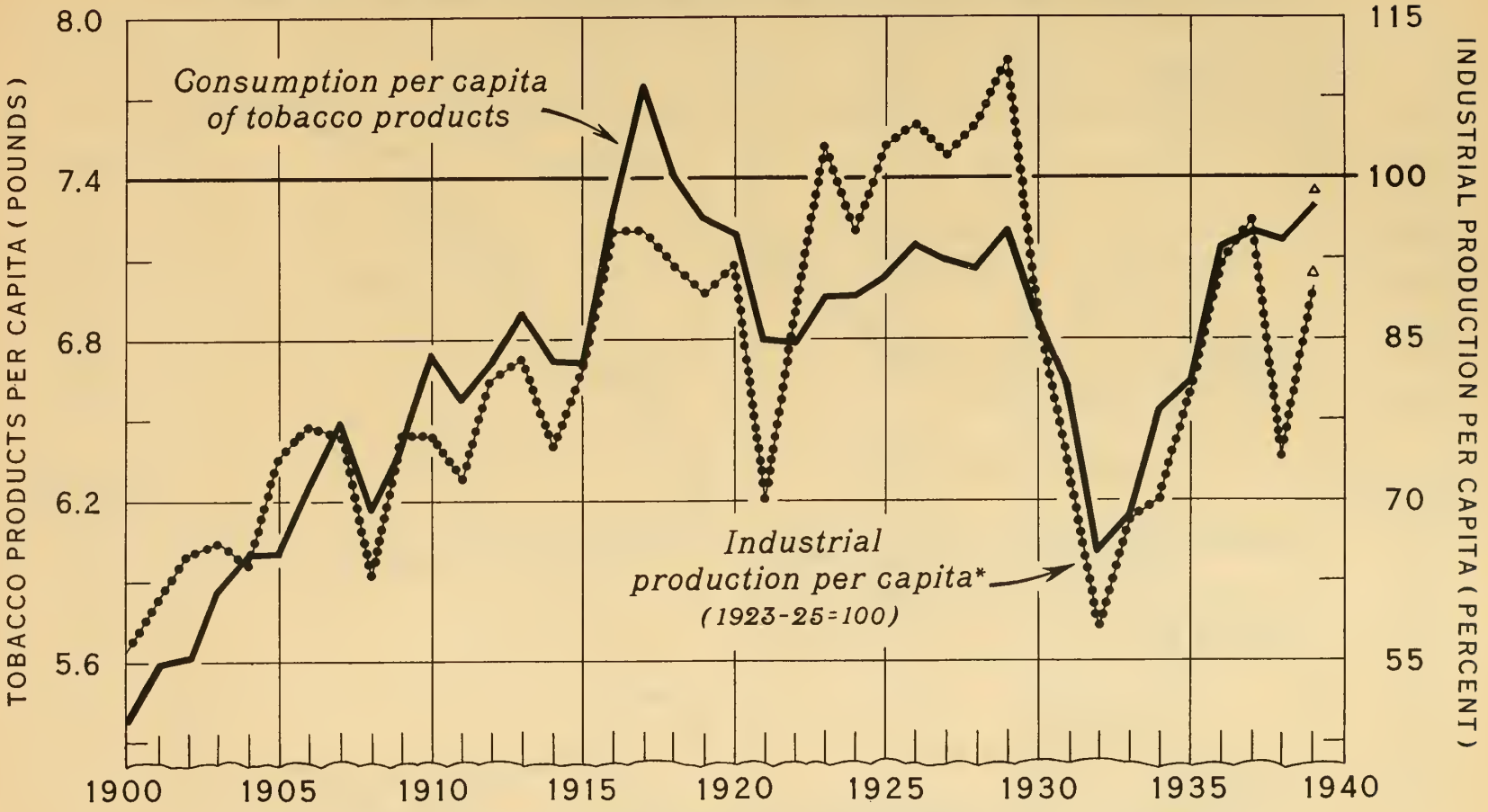
United States exports of dark tobaccos to principal importing countries, by types, average 1923-32, annual 1933-38 - Continued

Country to which exported	10-year average, 1923-32	1933	1934	1935	1936	1937 1/	1938 1/
	Crop year beginning October						
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
	Green River, type 36 2/						
United Kingdom	4,314	873	1,901	1,627	1,473	2,892	1,869
Netherlands	437	86	0	172	11	0	0
China	975	0	0	0	0	0	0
Belgium	901	892	1,032	1,510	506	494	158
Irish Free State	457	72	169	215	82	171	46
British West Africa 3/	1,063	201	93	63	39	31	31
Other countries	1,934	263	231	123	61	74	78
Total	10,081	2,387	3,426	3,710	2,172	3,662	2,182
	Black fat, water baler, and dark African 5/						
British West Africa 3/	2,976	4,089	5,112	5,185	5,172	3,849	3,235
French Africa 4/	1,623	2,104	2,694	2,740	2,602	2,476	3,200
British Guiana	157	169	52	72	102	151	151
Spanish Africa 6/	170	370	284	294	46	141	97
Portuguese Africa 7/	156	430	273	392	346	351	274
Germany	154	368	268	389	169	41	0
Other countries	574	775	997	995	1,075	828	817
Total	5,810	8,305	9,680	10,067	9,512	7,837	7,774

Compiled, average and 1933 from First Annual Report on Tobacco Statistics, Statistical Bulletin No. 58; 1934-37, Annual Report on Tobacco Statistics, 1939; and 1938 from official records of the Bureau of Foreign and Domestic Commerce, Department of Commerce.

1/ Preliminary.
2/ Average shown for One Sucker is computed on 7-year basis, and for Green River on a 10-year basis. Actually, however, One Sucker was included with Green River prior to January 1, 1927.
3/ Includes Gold Coast, Nigeria, and other British West Africa.
4/ Algeria, Tunisia, and Madagascar not included.
5/ Average shown is computed on 7-year basis, although export data were included under "other leaf" prior to January 1, 1927.
6/ Includes Canary Islands.
7/ Mozambique not included.

CONSUMPTION PER CAPITA OF ALL TOBACCO PRODUCTS, AND INDUSTRIAL PRODUCTION PER CAPITA, UNITED STATES, 1900-1939



* FEDERAL RESERVE BOARD INDEX NUMBERS ADJUSTED FOR CHANGES IN POPULATION

4 PRELIMINARY

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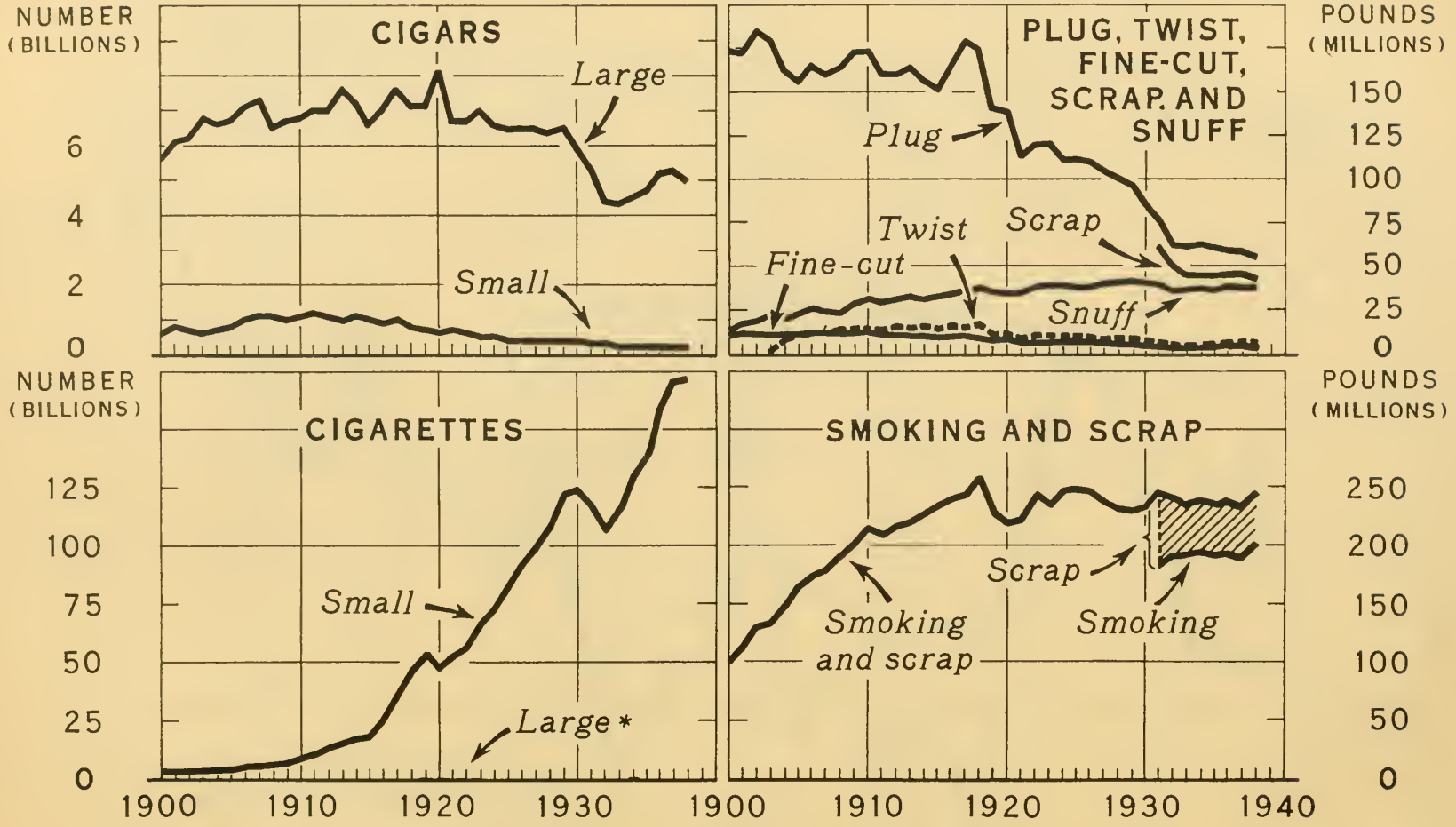
FIGURE 4

TOBACCO PRODUCTS: MANUFACTURES IN THE UNITED STATES, 1900-1938



DATA FROM ANNUAL REPORTS OF COMMISSIONER OF INTERNAL REVENUE

**LARGE CIGARETTES: 32 MILLIONS IN 1919, 2.8 MILLIONS IN 1933, 88.2 MILLIONS IN 1934, 2.5 MILLIONS IN 1936. THEY NEVER AMOUNTED TO ENOUGH TO SHOW ON SCALE WITH SMALL CIGARETTES.*

U. S. DEPARTMENT OF AGRICULTURE NEG. 32741 BUREAU OF AGRICULTURAL ECONOMICS

FIGURE 5

In connection with the dark types used in the rehandling export trade - or Black Fat, Water Baler, and Dark African - the downward trend is not so pronounced. In the process of preparation, Black Fat is heavily coated with oil (or grease) and high pressure is applied. The term Water Baler is still used although it is doubtful if it has any real application at the present time. Water Baler is prepared in somewhat the same manner as Black Fat except that it is dampened with water instead of being oiled or greased. The term Dark African is used to designate special grades of leaf for the African trade in which length of leaf is one of the most important factors, the effort being made to get exceptionally long leaves. Little, if any, oil (or grease) is used in the preparation of Dark African. A larger proportion of dark air-cured (principally One Sucker) is used in the preparation of Black Fat, Water Baler, and Dark African than of fire-cured, the proportion being about two-thirds or more of dark air-cured and the remainder fire-cured. Black Fat, Water Baler, and Dark African is almost entirely a West African trade. A smaller proportion, however, goes to the West Indies, and South American countries near the West Indies, principally British Guiana. (Table, pages 27 and 28.)

Dark-tobacco growers have been confronted for a number of years with the problem of adjusting production downward in order to bring supplies in line with decreased domestic consumption and exports. After the first World War, growers did reduce acreage and production of dark types but the adjustment in production occurred more slowly than the decreases in domestic consumption and exports. (Table, page 22.) Various Government programs have been active in recent years to reduce supplies of dark types still further.

In 1934 and 1935 production adjustment contracts of the Agricultural Adjustment Administration provided for rental and benefit payments to farmers who reduced acreage and production of dark tobacco. The Kerr-Smith Tobacco Act (repealed February 10, 1936) levied a tax upon the sale of excess tobacco by growers who refused to comply with production allotments. In 1936 and 1937 (after the invalidation on January 6, 1936 of the Agricultural Adjustment Act of 1933) the Agricultural Conservation Programs provided for payments to growers who diverted a percentage of the usual tobacco acreage to soil-conserving crops. Beginning in 1938 the Agricultural Conservation Program provided for payments to growers who planted within acreage allotments established for each farm. In addition, the Agricultural Adjustment Act of 1938 provides for the use of marketing quotas on dark types when supplies become excessive, if two-thirds of the growers vote favorably for such quotas. A marketing quota was in effect on the 1938 dark crop.

In March 1936, the Byproducts Diversion Program of the Agricultural Adjustment Administration became effective for the 1935 crop, and purchases were made also from accumulated stocks of the crops of the 4 previous years beginning with stocks of the 1931 crop. This program continued in effect through the 1938 crop. In all, about 62 million pounds of the dark types were diverted at an approximate cost of 4-3/4 million dollars, or about 7.7 cents per pound. The cost represents the difference between advances made on such tobacco and the prices paid for tobacco for byproducts uses. The dark tobacco supply situation was more favorable in 1939 than in any recent year, and no surplus removal program was in effect for the 1939 crop.

In earlier years from 5 to 8 million pounds of dark types had been purchased annually for conversion into nicotine, salts of nicotine, tobacco extracts, nicotine-free tobacco for fertilizer, tobacco sauces, and insecticides. The Agricultural Adjustment Act of 1938 (Sec. 202) has directed the Secretary of Agriculture to conduct researches into and to develop new scientific, chemical, and technical uses, and new extended markets and outlets for farm commodities. Tobacco is one of the five commodities subject to research and special attention will be given to the fire-cured and dark air-cured types. This research is a part of the work of the eastern regional laboratory at Philadelphia and special stress will be placed upon expanded uses of tobacco byproducts. 2/

Total carry-over of all dark types at the beginning of the 1940-41 marketing season is expected to be about the same as at the beginning of the 1939-40 season. The 1940 crop as indicated July 1 is a little smaller than the crop of 1939, resulting in a supply in 1940-41 slightly below that of 1939, when supply was well in line with disappearance in recent years.

In view of the uncertain European market and semi-official reports that some growers intended to increase acreages, an announcement was made in March that if any loans were made on dark tobacco by the Commodity Credit Corporation in 1940, such loans would be restricted to include only those growers planting within acreage allotments made under the Agricultural Conservation Program.

There seems no reason to believe that the present trends in consumption will not continue, with more emphasis upon products from flue-cured and light air-cured types. The position of dark types has been reversed since 1900. In the early 1900's dark types were the most important in exports and were much more important in domestic consumption than is true today. Now first place in exports has been yielded to flue-cured, all as a result of changes in habits and tastes during the intervening years. As to the more distant future no one can predict with certainty. It would seem, however, that the use of dark tobaccos has reached a low point from which it is not likely to rise at least in the near future. Changing consumer preferences have been responsible for this decrease in demand, and growers are faced with the necessity of making adjustments accordingly.

CLAUDIA THOMSON

2/ Export Trade In and Byproduct Uses of Tobacco, p. 49. Pages 44-50 of this document, prepared by a committee from the Department of Agriculture (1939) in response to Senate Resolution No. 291, contains a rather extensive discussion of byproduct uses of tobacco and laboratory research.

GENERAL STATISTICAL DATA

Tax-paid withdrawals of tobacco products, July-June, and production of manufactured tobacco July-April, in the United States, 1938 and 1939 1/

Products	Tax-paid withdrawals 12 months beginning July			Manufactured tobacco	Production 10 months beginning July		
	1938	1939	Change		1938	1939	Change
	Millions	Millions	Percent		1,000 pounds	1,000 pounds	Percent
Small cigarettes	168,017	177,684	+ 5.8	Smoking	164,392	167,705	+ 2.0
Large cigarettes	3	3	0.0	Plug	43,726	41,505	- 5.1
Large cigars	5,453	5,515	+ 1.1	Twist	4,483	4,721	+ 5.3
Small cigars	161	130	- 19.3	Fine-cut	3,732	3,546	- 5.0
Snuff 2/	38,511	37,770	- 1.9	Scrap chewing	36,387	35,253	- 3.1
Manufactured tobacco 2/	304,182	302,073	- .7				

1/ Tax-paid withdrawals include products from the Philippine Islands and Puerto Rico.
2/ Thousand pounds.

Exports of tobacco from the United States by types, export weight, 1938 and 1939

Type	9 months beginning October		
	1938	1939	Change
	1,000 lb.	1,000 lb.	Percent
Flue-cured 1/	362,501	252,310	- 30.4
Burley	8,605	8,928	+ 3.8
Ky. and Tenn. fire-cured	39,985	28,661	- 28.3
Va. fire-cured	7,496	3,540	- 52.8
Maryland 2/	2,755	1,338	- 51.4
One Sucker	1,304	2,098	+ 60.9
Green River	2,040	474	- 76.8
Cigar leaf	2,791	491	- 82.4
Perique	139	92	- 33.8
Black fat, and dark African	5,584	4,828	- 13.5
Stems, trimmings, and scrap	23,569	16,476	- 30.1

1/ 12 months beginning July.
2/ 6 months beginning January 1939 and 1940.

Acreage and production of tobacco in the United States, by types, 1939 and 1940

Type	Acreage			Production		
	1939 1/	1940 2/	Change	1939 1/	1940 2/	Change
	1,000 acres	1,000 acres	Per-cent	Million pounds	Million pounds	Per-cent
Total flue-cured, types 11-14	1,287.9	753.3	- 41.5	1,159.3	676.6	- 41.6
Old and Middle Belt, type 11	468.0	282.0	- 39.7	394.4	233.9	- 40.7
Eastern North Carolina, type 12	427.0	243.0	- 43.1	422.7	230.9	- 45.4
South Carolina, type 13	238.0	141.0	- 40.8	226.3	129.6	- 42.7
Georgia and Florida, type 14	154.9	87.3	- 43.6	115.9	82.2	- 29.1
Total fire-cured, types 21-24	111.7	116.2	+ 4.0	95.6	95.8	+ 0.2
Virginia, type 21	23.0	23.7	+ 3.0	20.9	18.2	- 12.9
Ky. and Tenn., type 22	62.0	64.5	+ 4.0	52.5	54.4	+ 3.6
Ky. and Tenn., type 23	25.9	27.2	+ 5.0	21.5	22.5	+ 4.7
Henderson, type 24	.8	.8	0.0	.7	.7	0.0
Burley, type 31	432.2	380.8	- 11.9	394.8	334.0	- 15.4
Maryland, type 32	38.2	37.8	- 1.0	29.8	24.2	- 18.8
Total dark air-cured, types 35-37	48.0	48.9	+ 1.9	43.3	42.1	- 2.8
One Sucker, type 35	24.1	24.5	+ 1.7	22.0	21.3	- 3.2
Green River, type 36	20.5	20.5	0.0	18.0	17.7	- 1.7
Va. sun-cured, type 37	3.4	3.9	+ 14.7	3.3	3.1	- 6.1
Total cigar filler, types 41-45	44.8	45.9	+ 2.5	53.4	46.1	- 13.7
Pa. Seedleaf, type 41	26.9	27.7	+ 3.0	35.5	27.7	- 22.0
Miami Valley, types 42-44	16.5	16.8	+ 1.8	16.5	16.8	+ 1.8
Ga. and Fla. sun-grown, type 45	1.4	1.4	0.0	1.4	1.6	+ 14.3
Total cigar binder, types 51-55	40.8	44.2	+ 8.3	61.1	62.7	+ 2.6
Conn. Valley Broadleaf, type 51	7.9	8.4	+ 6.3	12.8	12.8	0.0
Conn. Valley Havana Seed, type 52	8.1	8.6	+ 6.2	13.6	13.6	0.0
N.Y. and Pa. Havana Seed, type 53	1.8	1.9	+ 5.6	2.5	2.5	0.0
Southern Wisconsin, type 54	13.0	13.6	+ 4.6	18.2	18.4	+ 1.1
Northern Wisconsin, type 55	10.0	11.7	+ 17.0	14.0	15.4	+ 10.0
Total cigar wrapper, types 61-62	10.9	10.2	- 6.4	11.4	10.2	- 10.5
Conn. Valley Shadegrown, type 61	7.7	6.5	- 15.6	8.6	6.6	- 23.3
Ga. and Fla. Shadegrown, type 62	3.2	3.7	+ 15.6	2.8	3.6	+ 28.6
Total, all types	2,014.5	1,437.3	- 28.7	1,848.7	1,291.7	- 30.1

1/ Preliminary.
2/ Acreage for harvest and production indicated July 1.

United States imports of tobacco by countries, and shipments from noncontiguous territories, 1934-39 1/

Class and country from which imported	Year beginning July					
	1934	1935	1936	1937	1938 2/	1939 2/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Cigar wrapper:						
Netherlands	1,911	1,750	2,695	1,518	1,799	0
Netherlands Indies	0	1	0	0	0	2,059
Cuba	110	139	211	183	186	153
Other countries	0	3/	3/	0	0	3/
Total	2,021	1,890	2,906	1,701	1,985	2,212
Cigar leaf (filler):						
Unstemmed:						
Cuba	4,191	5,234	4,419	3,487	2,250	2,259
United Kingdom	0	0	0	0	0	0
Other countries	3/	1	1	0	0	3
Total	4,191	5,235	4,420	3,487	2,250	2,262
Stemmed:						
Cuba	6,465	9,285	6,448	6,598	7,604	8,918
Puerto Rico	16,645	18,616	18,964	16,376	15,530	---
Other countries	0	0	0	0	0	62
Total	23,110	27,901	25,412	22,974	23,134	8,980
Cigarette leaf:						
Greece	17,959	19,006	20,233	18,628	18,982	17,297
Italy	5,882	5,985	4,577	753	652	667
Turkey in Europe and Asia	12,425	15,982	19,799	20,509	27,592	26,144
Belgium	994	1,231	635	1,133	228	41
Germany 4/	28	162	300	664	494	3/
Egypt	183	26	16	18	11	4
United Kingdom	205	191	395	19	16	120
Bulgaria	3/	2	301	1,522	2,637	2,367
Palestine and Syria	166	312	622	994	1,357	1,453
Netherlands	739	391	51	37	9	0
Malta, Gozo, and Cyprus	30	230	57	10	0	0
Other countries	27	20	49	540	805	1,827
Total	38,638	43,538	47,035	44,827	52,783	49,920
Stems, scraps, and trimmings:						
Cuba	2,876	3,423	2,465	2,836	3,019	3,284
United Kingdom	1,742	1,767	1,818	1,628	1,532	1,145
Philippine Islands	2,169	2,370	3,423	5,395	5,093	11,596
Puerto Rico	3,329	4,541	4,616	4,323	7,678	---
Other countries	167	387	794	1,549	1,819	1,332
Total	10,283	12,488	13,116	15,731	19,141	17,357

1/ Imports for consumption.
2/ Preliminary.
3/ Less than 500 pounds.
4/ Beginning May 6, 1938, the United States trade with Germany includes Austria; for comparable figures in earlier years add Austria and Germany.

Compiled from official records of the Bureau of Foreign and Domestic Commerce; shipments from Puerto Rico not available for 1939 at the time of the release of this TOBACCO SITUATION.

United States imports of tobacco products by countries, and shipments from noncontiguous territories, 1934-39 1/

Product and country	Year beginning July					
	1934	1935	1936	1937	1938 2/	1939 2/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Cigars and cheroots:						
Cuba	48	64	47	42	37	49
Belgium	3/	3/	0	3/	3/	3/
Germany 4/	3/	3/	3/	0	0	0
United Kingdom	3/	3/	3/	3/	3/	3/
Philippine Islands	3,966	3,767	3,377	3,546	3,336	3,946
Puerto Rico 5/ 6/	1,102	959	906	216	25	---
Other countries	1	3/	3/	3/	1	1
Total	5,117	4,790	4,330	3,804	3,399	3,996
Cigarettes:						
United Kingdom	2	2	2	1	2	2
Egypt	1	1	1	1	3/	1
Philippine Islands	5	66	4	2	3	2
Puerto Rico 5/ 7/	8	8	11	13	13	---
Other countries	3/	3/	3/	1	3	2
Total	16	77	13	18	21	7
All other tobacco products: 8/						
Hong Kong	55	60	44	30	16	10
United Kingdom	29	43	49	40	56	59
Italy	24	32	21	25	19	16
Canada	3	3	4	3	3	2
Cuba	3/	1	1	3/	3/	3/
Egypt	0	0	0	0	0	0
China	4	5	5	18	48	31
Azores	3/	1	2	1	1	1
Ireland	3/	3/	0	3/	3/	3/
Puerto Rico 5/	2	2	6	2	2	---
Other countries	2	1	3/	4	1	2
Total	119	148	132	123	146	121

1/ Imports for consumption.
2/ Preliminary.
3/ Less than 500 pounds.
4/ Beginning May 6, 1938, the United States trade with Germany includes Austria; for comparable figures in earlier years add Austria and Germany.
5/ No shipments reported from Alaska, Hawaii, and the Virgin Islands.
6/ Conversion to pounds made on basis of 18 pounds per 1,000 cigars.
7/ Conversion to pounds made on basis of 2.25 pounds per 1,000 cigarettes.
8/ Includes snuff and snuff flour; stems cut, ground, or pulverized and manufactures of tobacco not specially provided for.

Compiled from Monthly Summary of Foreign Commerce of the United States and official records of the Bureau of Foreign and Domestic Commerce; shipments from Puerto Rico not available for 1939 at the time of the release of this TOBACCO SITUATION.

United States imports of cigarette paper for consumption, by class and by country, 1934-39

Class and country	Calendar year					
	1934	1935	1936	1937	1938	1939 1/
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
In bobbins						
France	11,595	12,513	14,884	15,868	15,190	
Spain	52	13	14	16	8	
Other countries	2	6	14	37	146	
Total	11,649	12,532	14,912	15,921	15,344	2/15,503
Flat						
France	1,146	597	200	48	37	
Italy	20	17	25	40	33	
Spain	1	3	3	1	1	
Other countries	7	1	1	1	1	
Total	1,174	618	229	90	72	3/
Books, and book covers:						
France	2,929	2,153	1,447	1,209	1,127	
Italy	13	7	3	1	---	
Portugal	4	1	6	6	5	
Spain	3	3	7	2	2	
Canada	---	---	8	1	8	
Other countries	2	3	4/	1	1	
Total	2,951	2,167	1,471	1,220	1,143	1,353

1/ Preliminary.
2/ Includes "flat".
3/ Included in "bobbins".
4/ Less than 500 pounds.

Compiled from Tariff Commission Comparative Statistics of imports for consumption, 1934; Foreign Commerce and Navigation of the United States, 1935-38; Monthly Summary of Foreign Commerce, 1939.

It is expected that the fifth Annual Report on Tobacco Statistics, 1940, will be ready for distribution sometime in September.

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United States imports of licorice for consumption, by class and by country, 1934-39

Class and country	Calendar year					
	1934	1935	1936	1937	1938	1939 1/
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Licorice root, crude						
Greece	2,412	2,569	3,916	5,042	4,638	
Italy	1,219	2,673	1,864	4,725	2,095	
Union of Soviet Socialist Republics	11,034	2/14,644	10,507	16,036	15,379	
Spain	1,263	1,286	11	1,926	635	
Iraq	10,126	18,276	11,290	14,082	9,530	
Syria	230	1,498	1,275	4,424	9,381	
Turkey	26,566	18,642	26,146	23,099	23,425	
Other countries	163	143	152	233	80	
Total	53,013	59,731	55,161	69,567	65,163	62,331
Licorice extract, paste, rolls, etc.						
France	3	2	36	50	26	
Germany	0	0	3/	0	0	
Italy	14	5	32	19	0	
Spain	473	658	512	527	265	
Turkey	44	21	122	106	49	
Other countries	27	5	7	38	22	
Total	561	691	709	740	362	466

Compiled from Foreign Commerce and Navigation of the United States.
1/ Preliminary. 2/ The 1934 figure is for Russia in Europe only. Beginning 1935 data are for Russia in Europe and Asia. 3/ Less than 500 pounds.

United States imports of brier, ivy, or laurel root (in blocks), for consumption, by countries, 1935-39 1/

Country	Calendar year				
	1935 2/:	1936	1937	1938	1939 3/
	1,000 blocks	1,000 blocks	1,000 blocks	1,000 blocks	1,000 blocks
France	7,044	3,184	6,178	8,248	
Italy	15,145	18,965	19,137	21,381	
Spain	839	1,432	724	147	
Greece	741	990	761	959	
Albania	---	654	925	966	
Other countries	46	92	133	4/2,781	
Total	23,815	25,317	27,858	34,482	36,903

Compiled from Foreign Commerce and Navigation of the United States and the Monthly Summary of Foreign Commerce of the United States.
1/ Not further advanced than cut into blocks. Besides the brier, ivy, and laurel root blocks imported, imports of manufactured pipes, with bowls of brier or other wood or root, averaged 593,614 in the 5 years 1934-38 and the value averaged $238,874. Practically all of these manufactured pipes were imported from the United Kingdom, with a few coming from France, Austria and other countries. 2/ Given in value only, prior to 1935. 3/ Preliminary. 4/ Algeria.